

Your Guide to Start Using iManage



iManage
infoRite



Microsoft
Outlook



Internet
Explorer

Working

with

iManage



iManage Document Management

Software:
infoRite 5.3
infoLook 2.2
infoLink 3.5

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Introduction

What is Document Management?

Every day you create, edit, and save project related documents. When many people are storing and retrieving the same documents it can become a nightmare if you can't immediately recall where you saved a file or if you looking at the latest version of the document.

iManage is a document management system (DMS). A DMS becomes your electronic file clerk. You tell the DMS some information about a new document, such as the author and subject and the DMS files the document for you. When you want to find the document you tell the DMS to get you the document(s) for the subject and the DMS finds the document for you very quickly.

One of the most beneficial aspects of the DMS is you do not need to remember where the document is filed. All you need to remember is any single piece of information about the document, such as:

The **author** of the document

The person **who input** the document

Any word contained in the **description** or **title**

Any **unique word** or **phrase** contained within the document text

The approximate **date** the file was created

The Hardcopy Location or Originating office

The document **class** or **category**, such as "Invoice," "Report/Study", or "Executive only"

iManage provides access to documents 3 different ways: infoRite, infoLook, and infoLink:

infoRite is a full-featured client application that integrates with other applications such as Microsoft Word and Excel

infoLook is a part of Microsoft Outlook and primarily provides the ability to easily insert email and attachments into the database as well as the ability to access to documents already in the database without opening a separate application

infoLink is a web based client that provides access via Microsoft Internet Explorer. It is primarily by internal intranet users to gain access to documents already in the database and to add new documents into the database. It can be used by external users with VPN or public internet access to access documents already in the database and to add new documents into the database, if allowed.

iManage Databases

When you fill in a profile you create a database record for your document. All documents created in your organization are automatically recorded in a database.

Integration with Your Software Applications

iManage integrates with many major Windows applications. Therefore when you invoke **File Open, Save, Save As or Insert/File** iManage automatically assists you.

Benefits

Take some time to review the table of benefits below. You may be surprised at just how much the iManage DMS can do for you.

Feature	Description/Benefit
Toolbar	The iManage window features an easy-to-use toolbar interface with icons for all major functions.
Worklist	The last 40 documents you worked on are stored in the Worklist. This allows for instant retrieval of the most recent documents you created or accessed.
Profile Searching	Documents can be easily located by recalling as little as one item from the profile.
Full-text Searching	Documents can be easily located based upon text contained in the document.
Document History	iManage maintains a complete history of activity for every document. When other users have viewed or edited your document iManage keeps an audit trail of activity.
Saved Searches	If you perform the same searches frequently you can save the search criteria for easy retrieval later.
Access Control (Security)	You control which users or groups of users have access to your documents.
Profile Defaults	You can make profile creation faster by having defaults for fields that are the same most the time.
Version Control	You can create multiple versions of the same document.
Projects	You can associate documents with specific project folders speeding access to a select group of documents.
Check In or Out	You can check out documents to ensure that no other users change them when you are collaborating on a document.
Related Documents	You can easily relate documents to each other

Using infoRite

How Does Document Management Work?

Whenever you save a document, you fill in a document profile that describes the document. A Profile Screen is illustrated below.

The screenshot shows a Windows-style dialog box titled "EBT New Profile File imported into: \\EBT_SRV3\EBTdocs". The dialog is divided into several sections:

- Required Fields:** This section contains several input fields and dropdown menus. The "Doc Date" field is set to "05/21/2001". The "Class" field has a green exclamation mark icon and a dropdown menu. The "Orig. Office" field has a dropdown menu. The "Owner" field has a green exclamation mark icon and a dropdown menu. The "Category" field has a dropdown menu. The "Originator/Author" field is empty. The "Click/Complete -->" button is labeled "Description". The "Distribution" field is empty. The "Hardcopy Loc." field has a dropdown menu. The "Operator" field has a green exclamation mark icon and is set to "KGASCA". The "Type" field has a green exclamation mark icon and is set to "ACROBAT".
- Buttons:** On the right side, there are buttons for "OK", "Cancel", "Help", and "Duplicate Profile From...".
- Database:** A dropdown menu is set to "EBT docs".
- Security:** A button labeled "Access Rights" is present. Below it, a dropdown menu is set to "Private".
- SecurityTemplate:** A dropdown menu is set to "<None>".
- Memo/ Misc.:** A text area is empty.
- Archive Date:** A dropdown menu is set to "05/21/2001".
- Destroy Date:** A dropdown menu is set to "05/21/2001".

Filling out a document profile takes only a few seconds. Once the profile is complete, iManage files the document on your file server for you, using the information in the profile to store it in the correct location.

Finding and Retrieving Documents

When you need to retrieve a document, you can quickly access a list of recently edited documents (**Worklist**) or you can initiate a search. Your **Worklist** is a list of the last 40 documents you have worked with. A search requires filling in a blank profile screen with one or more pieces of information you remember about the document such as author and type and then clicking the **Find** button to start the search. Within a few seconds, all files that match your criteria are listed on your screen as a **Search Result** or **Worklist** like the one below.

This area contains the results.

The screenshot displays the iMANAGE Desktop application. The left sidebar shows a tree view with 'iManage Databases' expanded, containing 'Worklist', 'Search History', 'Personal', 'Public', 'Private Saved', 'Public Saved', and 'infoclink'. The main window shows a table of documents with columns: Database, Description, Doc. Num, Ver., Author, Class, Edit Date, and File Size. The table lists various documents, with the first row highlighted. Below the table, the 'Document Profile' for document 439 is shown, including fields for Description, Doc. Num, Version, App. Type, Class, Bureau, Program, and Comments. The status bar at the bottom indicates '1 document(s) selected', 'DNEWTON', and '33 Items'.

Database	Description	Doc. Num	Ver.	Author	Class	Edit Date	File Size
iManage	iManage screenshots	439	1	DNEWTON	DELETE	1/3/2001 9:22:30 AM	56KB
iManage	iManage Pilot group user training flye	428	1	DNEWTON	COMMUN	1/3/2001 9:17:22 AM	22KB
iManage	pc-coord	4	1	POQUIN	OTHER	12/26/2000 9:48:44 AM	23KB
iManage	iManage pilot group membership	429	1	DNEWTON	OTHER	12/21/2000 10:30:14 AM	19KB
iManage	Troubleshooting Internet connection	345	1	JSIEGEL	FORM	12/19/2000 10:46:40 AM	21KB
iManage	Internet connection problems spread	358	1	JSIEGEL	OTHER	12/18/2000 10:02:43 AM	16KB
iManage	PC Coordinator Meeting Agenda	255	1	POQUIN	OTHER	12/14/2000 2:37:07 PM	21KB
iManage	imanager tasks & responsibilities	260	1	DNEWTON	DOCUMENT	12/11/2000 11:43:16 AM	14KB
iManage	Software & Hardware Maintenance	46	1	DNEWTON	OTHER	12/7/2000 9:35:06 AM	21KB
iManage	iManage Planning Meeting Summary	337	1	DNEWTON	MEETING	12/6/2000 12:09:30 PM	30KB
iManage	handhelds	164	1	DNEWTON	ADMIN	12/6/2000 12:09:30 PM	21KB
iManage		153	1	PZOGRAF	DOCUMENT	11/30/2000 3:16:05 PM	19KB
iManage	iManage Planning Meeting	330	1	DNEWTON	MEETING	11/28/2000 9:23:05 AM	20KB
iManage	iManage Task Access Requirements	271	2	DNEWTON	DOCUMENT	11/27/2000 11:43:20 AM	36KB
iManage	Intercom article for CiscoSecure upg	267	1	JSIEGEL	MEMO	11/16/2000 1:32:23 PM	19KB
iManage	CiscoSecure upgrade	263	1	JSIEGEL	OTHER	11/16/2000 1:32:17 PM	24KB

Document Profile - Document: 439_1.DOC (iManage screenshots)

Profile Fields	Content
Description	iManage screenshots
Doc. Num	439
Version	1
App. Type	WORD97
Class	DELETE
Bureau	ITB
Program	
Comments	

1 document(s) selected | DNEWTON | 33 Items

Creating Documents from within an Application

EBT New Profile File imported into: \\EBT_SRV3\EBTdocs

Required Fields

Title: New Document Example

Doc Date: 05/21/2001

Class: COUNTY (An ! denotes a required field.)

Orig. Office: SANTA_CRUZ (An ! denotes a required field.)

Owner: KGASCA (An ! denotes a required field.)

Category: CORRESPONDENCE

Originator/Author:

Click/Complete -->: Description

Distribution:

Hardcopy Loc.: SANTACRUZ1

Operator: KGASCA (An ! denotes a required field.)

Type: ACRBAT (An ! denotes a required field.)

Memo/ Misc.:

Archive Date: 05/21/2001

Destroy Date: 05/21/2001

Buttons: OK, Cancel, Help, Duplicate Profile From...

Database: EBTdocs

Security: Access Rights, Public

SecurityTemplate: <None>

1. Create a new document in your application, From the application's menu bar select File/Save or File/Save As.
2. Fill out the New Profile Screen. If you need to look up the available valid entries for the field click on the [...] button to the right of the field to display valid entries.
3. Click OK and continue working on your document.

Document Numbers

Each new document you create is assigned a sequential unique number. The document number is not assigned until you complete the profile and click on the OK button. When a document is deleted from the iManage system the document's number is not re-used.

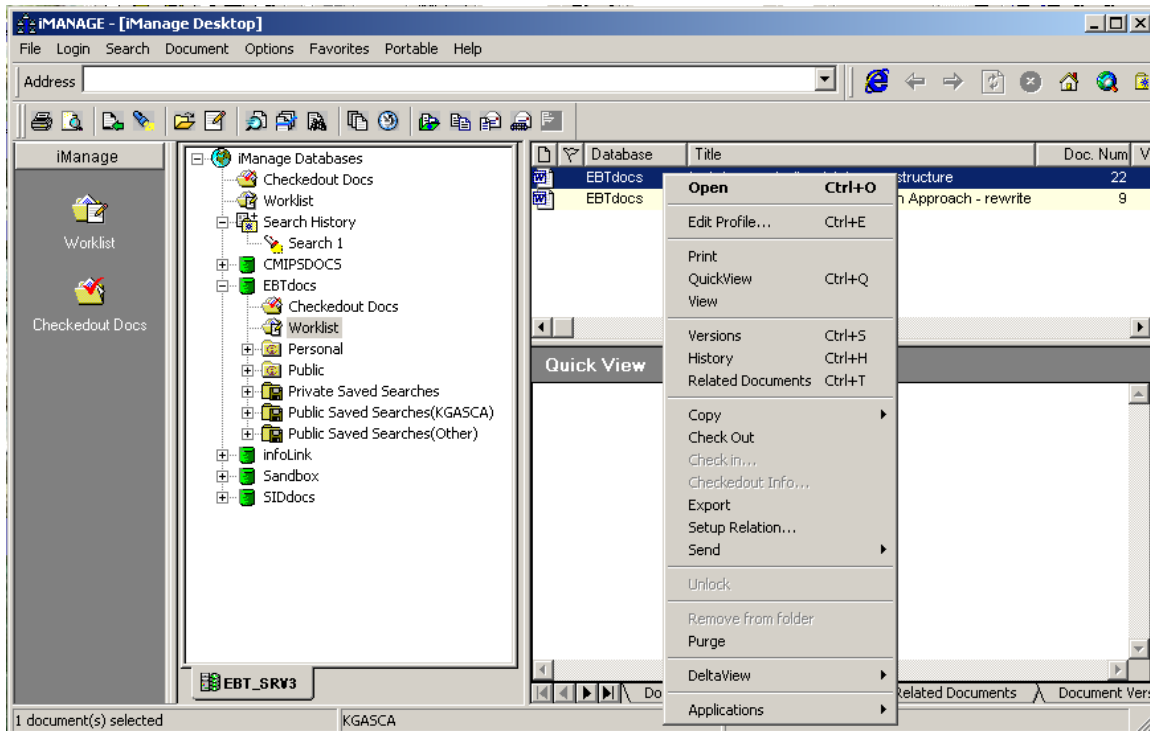
The document number can be displayed on the Worklist and Search Results List.

Updating Documents

You need only create a document profile once for each document. Subsequent saves update the document without further prompting. You can edit the profile any time you need to.

Editing/Updating a Document Profile

You may need to edit the information contained in a document profile. When displaying the Work List or a Search Result list with the iManage application window, the list displays in its own window. **A QuickMenu is displayed by right-clicking the mouse on a document in the list.** A sample QuickMenu featuring the Edit Profile option is illustrated below.



Choose Edit Profile to make changes to the profile. Click OK to complete your work and save your changes.

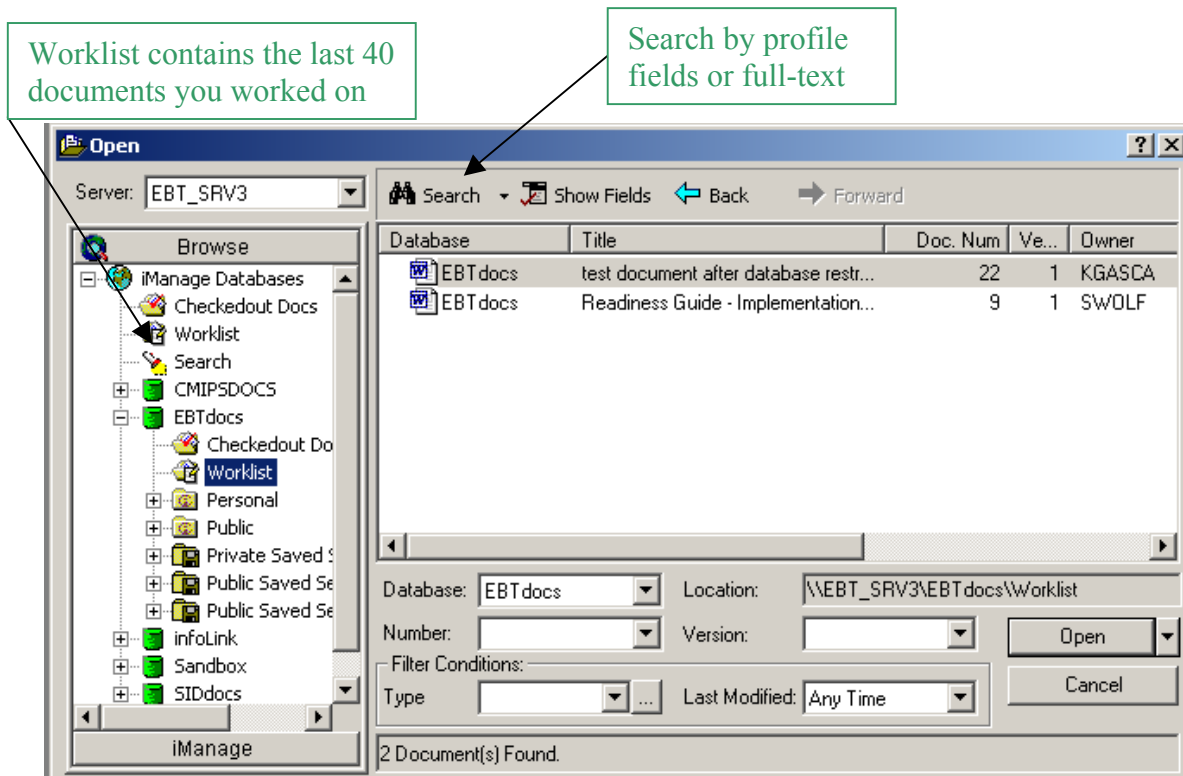
Many integrated applications also allow you to edit a Document Profile within your windows application. In this case you can select the *Edit Profile* option from the *File* menu.

Searching for Documents

If you don't recall a document's number and if it was not recently edited you must search the iManage database for the document. You must remember at least one detail about the profile or the document. For example, who is author? During what time period was the document created? What is are some of the words you used in the title?

To search for documents from your windows application, such as MS Excel or Word, select **File, Open** from your application's menu.

The following screen will appear.




This dialog box allows you to search in many different ways.

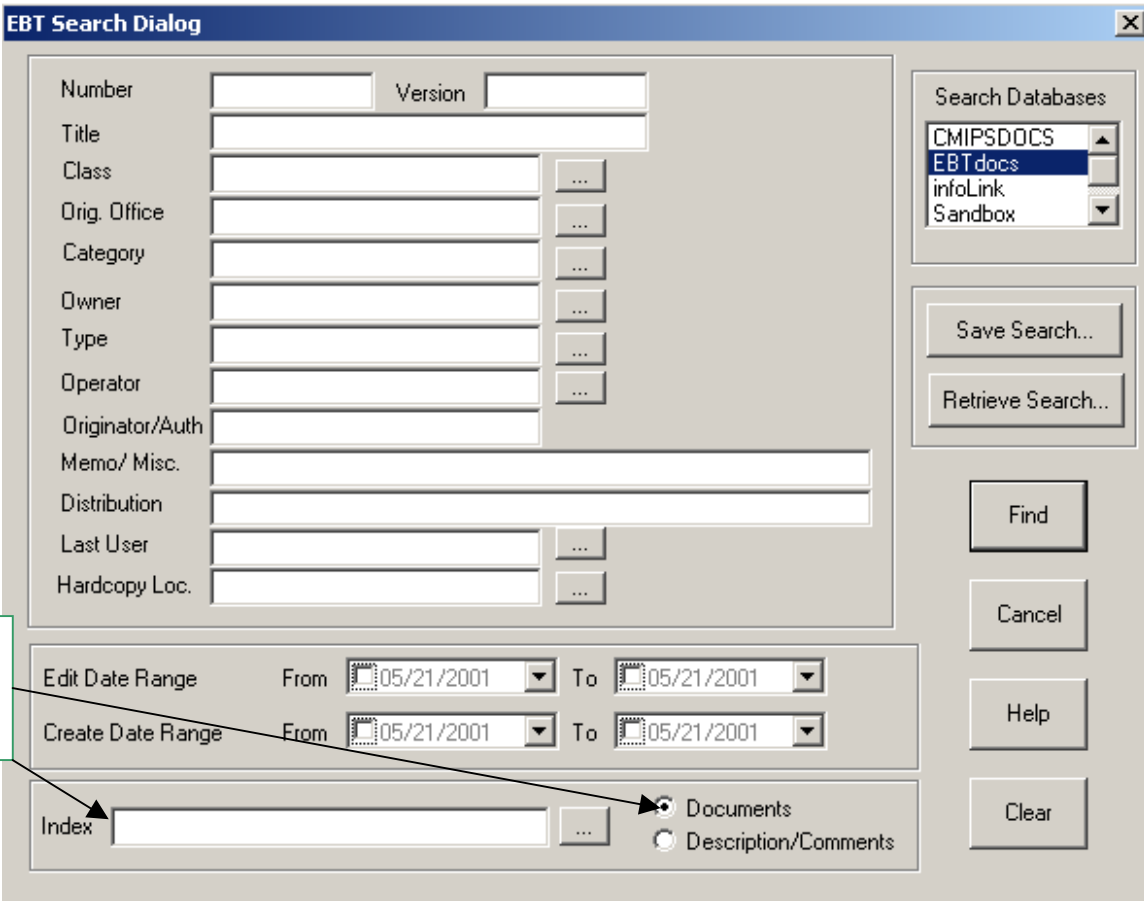
Worklist – the last 40 documents you have worked on

Document Number – if you know the document number

Profile or Full Text Search – search on any profile field(s) or full-text of the documents

The most common search is a Profile Search. To initiate a Profile/Search

Click on the **Search** button  and the profile search screen will appear.



The EBT Search Dialog window contains the following fields and controls:

- Search Databases:** A list box with options: CMIPSDOCS, EBT docs (selected), infoLink, and Sandbox.
- Buttons:** Save Search..., Retrieve Search..., Find, Cancel, Help, and Clear.
- Search Fields:**
 - Number, Version, Title, Class, Orig. Office, Category, Owner, Type, Operator, Originator/Auth, Memo/ Misc., Distribution, Last User, and Hardcopy Loc. (each with a text box and a browse button).
 - Edit Date Range: From [05/21/2001] To [05/21/2001]
 - Create Date Range: From [05/21/2001] To [05/21/2001]
 - Index: [] (with a browse button)
 - Search Type: ☒ Documents, ☐ Description/Comments

A green box labeled "Search Document Text" has an arrow pointing to the Index field.

Click the **Clear** button to clear any previous search criteria, if necessary.

In the appropriate fields, type any information you remember about the document(s) you're looking for.

Click the **Find** button.

From the resulting **Search Result** list, double-click the document you want to open.

Full-Text Searches

If you want to locate a document or documents based upon the occurrence of words or phrases within the documents you can employ a full-text search. Text phrases or words are input in the box labeled **Index** in the **Search Dialog** box.

Boolean operators (AND, OR, NOT) are used to fine-tune your search. For example, typing **scully AND mulder** in the Index box locates documents containing both names. Typing **scully OR mulder** locates documents containing either or both names.

The asterisk “*” or the question mark(?) wildcard characters can be used in the index field.

* - Use to represent two or more letters in a word, i.e. Ander*

? – Use to represent one letter in a word, i.e. Anders?n

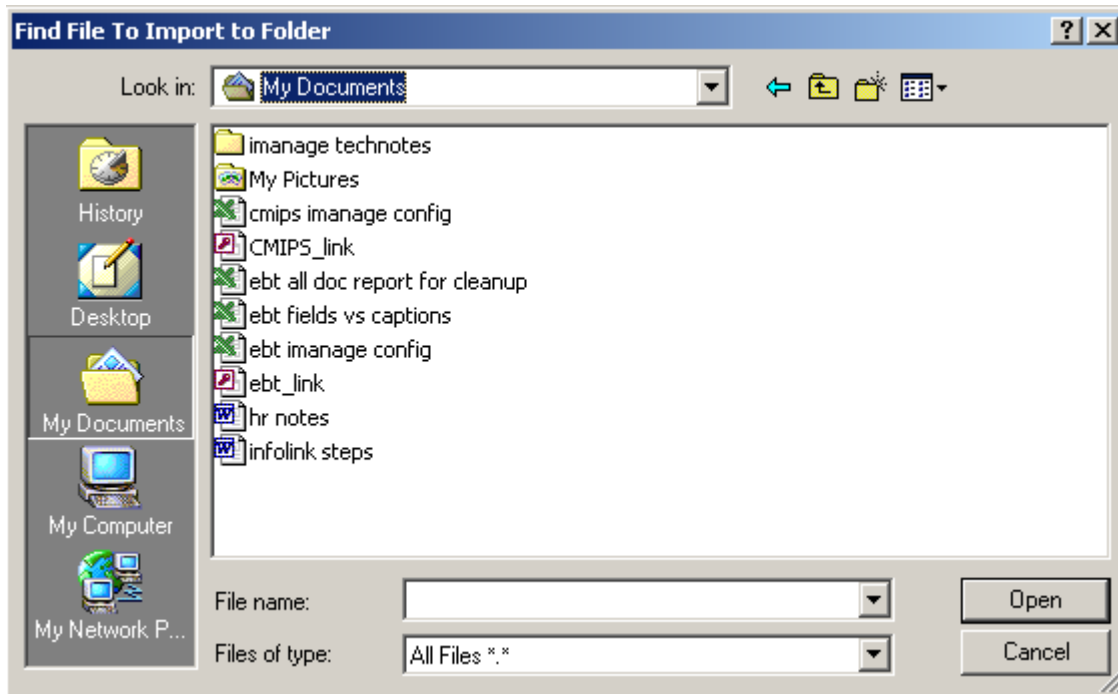
Full-Text Tips

The following table presents some important information regarding full-text searches.

Character/Word	Explanation
A, an, the, of, not	Words that are high frequency are called “stop words” and are not indexed. Do not use these words to do your searches.
AND	Typing AND between search terms tells iManage to find documents containing both words. The words can be anywhere in the document and thus do not have to be together in a sentence.
Any phrase	When you type a phrase (any two or more words) the words must be together in a search. For example a search for “pine tree” would not find the phrase “a pine is a tree”. A better search would be “pine AND tree”.
Apostrophes	Ignored. O’Malley is stored as Omalley.
Hyphens	Hyphenated words are indexed as four possible words. Double-play is indexed as double, play, doubleplay and double-play.
Illegal Characters	Do not use the following in search criteria: “,:@[]<>={}/~ These are reserved for special purposes.
NOT	Typing NOT in front of a search term tells iManage to exclude documents containing the term. Type: Pine NOT tree to located documents containing pine but not when the document also contains tree
OR	Typing OR between search terms tells iManage to find documents containing either or both of the words or phrases.
Parentheses	Use () to clarify a search. (Pine OR tree) NOT Oak evaluates the terms in parentheses first.
Plural words	Full-text searches regard the searches as literal. If you want to include plurals or tenses use the * wildcard operator. To find stadium or stadiums type: Stadium*.
Quotation marks	Quotes are ignored when documents are indexed

Importing Documents

It is common for people to want to import a document created at home or somewhere else into iManage. The most straight forward method is to use iManage Import, located on infoRite's menu under File, Import. Selecting this option displays the following dialog box.



Use **Drives**, **directories**, and **File Name** lists to select the desired file , then click **OPEN**. iManage presents a new profile screen for you to fill in for the imported file. Complete the profile and click **OK**.

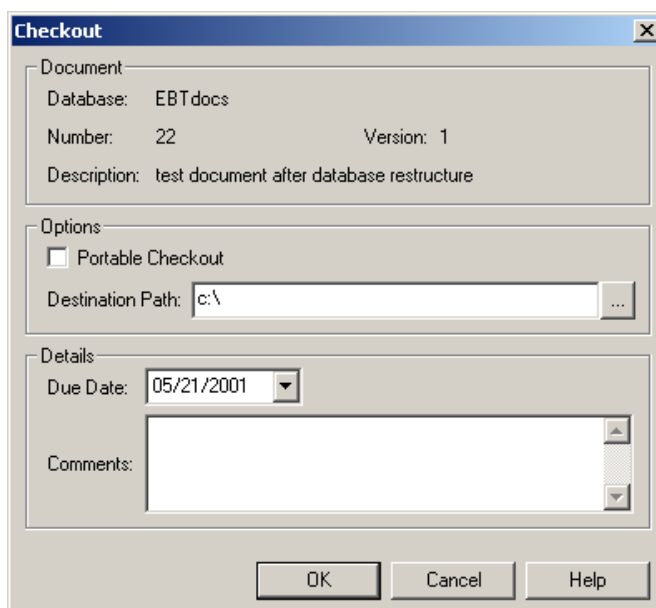
Checking Documents Out and In

If you want to take a document out of the office with you that is managed by iManage you can check it out of the system onto a diskette. Checking out a document registers you as the “borrower” of the document so that other users know who has taken the document. The document itself is not removed from the network—it is copied—but the original document on the network is “locked” until the checked out document is returned.

If any valid user tries to open a document that is checked out, iManage displays a prompt stating that the document is checked out and allows them to open a read-only copy.

Checking Out a Document

Switch to the iManage application window and display the Work List or perform a search to display a Search Result list that contains the document you want to check out. Select the desired document from the list. Next, choose **Document, Checkout** from the iManage menu. The Checkout Document dialog box appears.

The image shows a screenshot of the 'Checkout' dialog box in the iManage application. The dialog box has a title bar with the text 'Checkout' and a close button. It is divided into three main sections: 'Document', 'Options', and 'Details'. The 'Document' section contains fields for 'Database: EBT docs', 'Number: 22', 'Version: 1', and 'Description: test document after database restructure'. The 'Options' section has a checkbox for 'Portable Checkout' which is currently unchecked, and a 'Destination Path' field with the text 'c:\' and a browse button (...). The 'Details' section has a 'Due Date' dropdown menu showing '05/21/2001' and a 'Comments' text area. At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Help'.

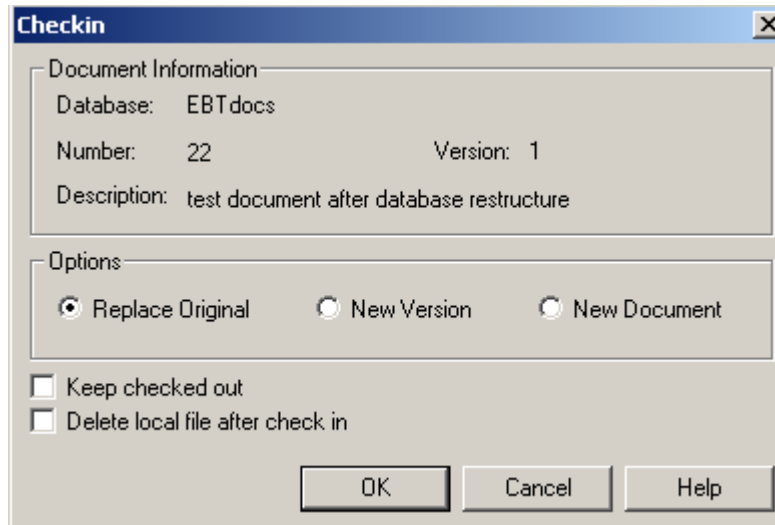
In the Options box you can check the Portable Checkout option (this checks the document out to a pre-defined directory for use with iManage when the network is unavailable (for example if you have a docking laptop).

If you want to check it out for other purposes, fill in the destination path where you want to save it. For example, c:\my documents or a:\. You can change the destination by clicking on the [...] button. You are asked to supply a date when you expect to return the document and you provide comments on why you are borrowing the document.

Once you click OK, the document is copied to the specified location and the document is flagged as “checked out.”

Checking a Document Back In

Choosing **Document, Checkin** from the iManage menu displays a list of all documents you've checked out, as illustrated below.



Select the document you want to check-in from the worklist or search results and click the **Checkin...** Button. iManage displays some options as shown above.

Replace Original – This is the default setting. The document on the network is overwritten by the incoming version from diskette.

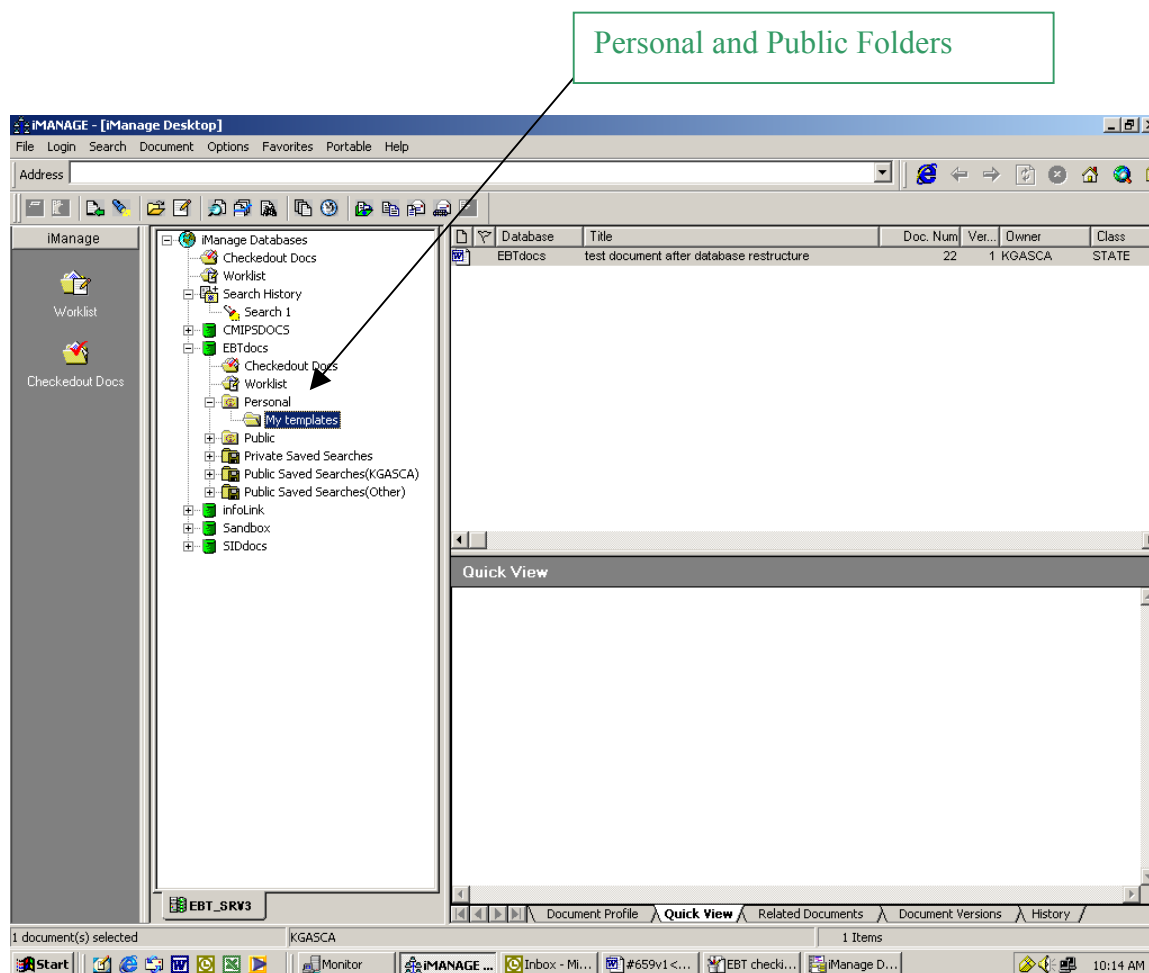
New Version – The diskette copy becomes a new version of the network document. iManage presents the New Version Profile dialog so that you can fill in a profile for a new version.

New Document – The diskette copy becomes a new document and you are asked to fill in a new Document Profile for the incoming document.

Creating Folders

When you are working on a major project, there are often several documents related to that project. iManage allows you to create a project folder for documents and give the folder a name. The next time you want to see that set of documents you display the project folder.

Project folders can be personal (private) or public as shown below. Users can create personal (private) folders, but only administrators can create public folders since they appear on everyone's infoRite desktop.



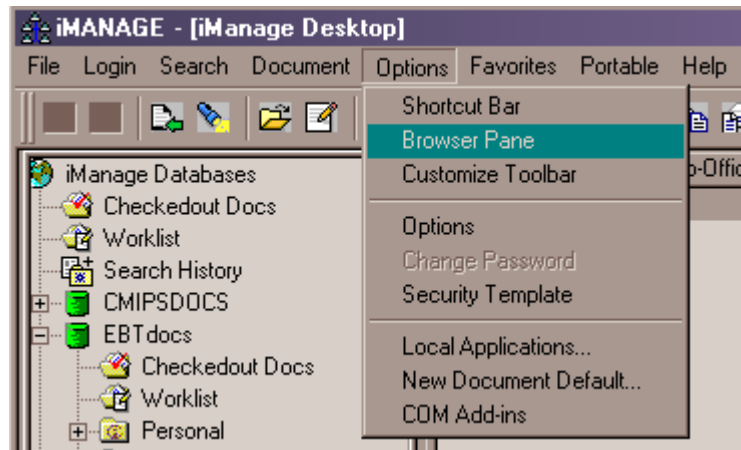
Once folders are created, they can be displayed from the iManage desktop by clicking on the appropriate folder as shown above.

Right-click on the Personal folder and click on the “create” button in order to create a new folder. To add documents to the folder you can perform a search or use your worklist and then drag and drop documents from the search results or worklist into the folder. The documents are not actually copied to the folder, only links to the documents are placed there.

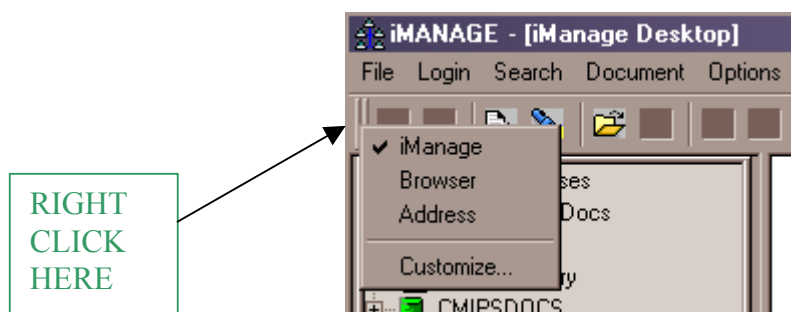
Saving Web Pages or URLs

You can save web pages or URLs in iManage. In order to accomplish this, follow the following steps to enable the browser features in infoRite:

First, enable the Browser Pane in the infoRite client – go to the Options menu, check Browser Pane. The right side of your infoRite client will turn into a “mini” Internet Explorer window.



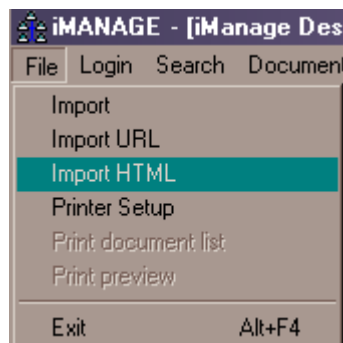
Second, Modify the infoRite toolbar to include Internet Explorer items. Position your mouse to the left side of the infoRite toolbar and RIGHT CLICK. Select Browser and then Address



Your infoRite client will now look similar to this:



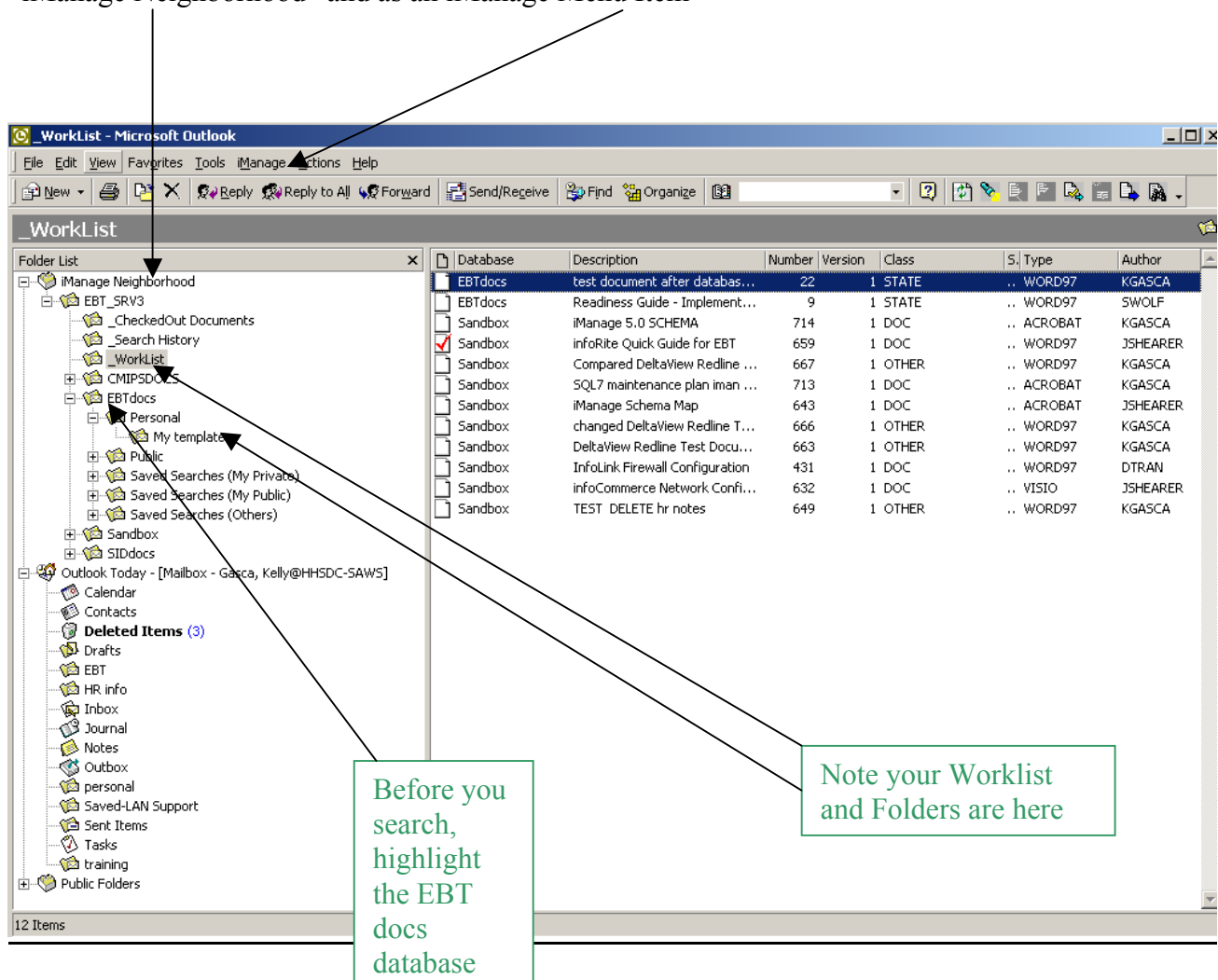
When you come across a web page you want to add into iManage as a document, choose File, Import HTML to save the webpage (choose Import URL to save just a link to that web address)... Fill out the profile and click OK.



It is important to remember that the internet is a very dynamic and even unstable place. If you save a URL (link), it may not be valid in 6 months, or even the next day. It is best to use links for main website addresses/home pages that don't change, e.g. www.hhsdc.ca.gov. Don't use links for any secondary pages, e.g. <http://www.sfbg.com/News/35/36/36edwelf.html>

Using infoLook

When installed, iManage's infoLook client appears in your Microsoft Outlook Folder List as "iManage Neighborhood" and as an iManage Menu Item

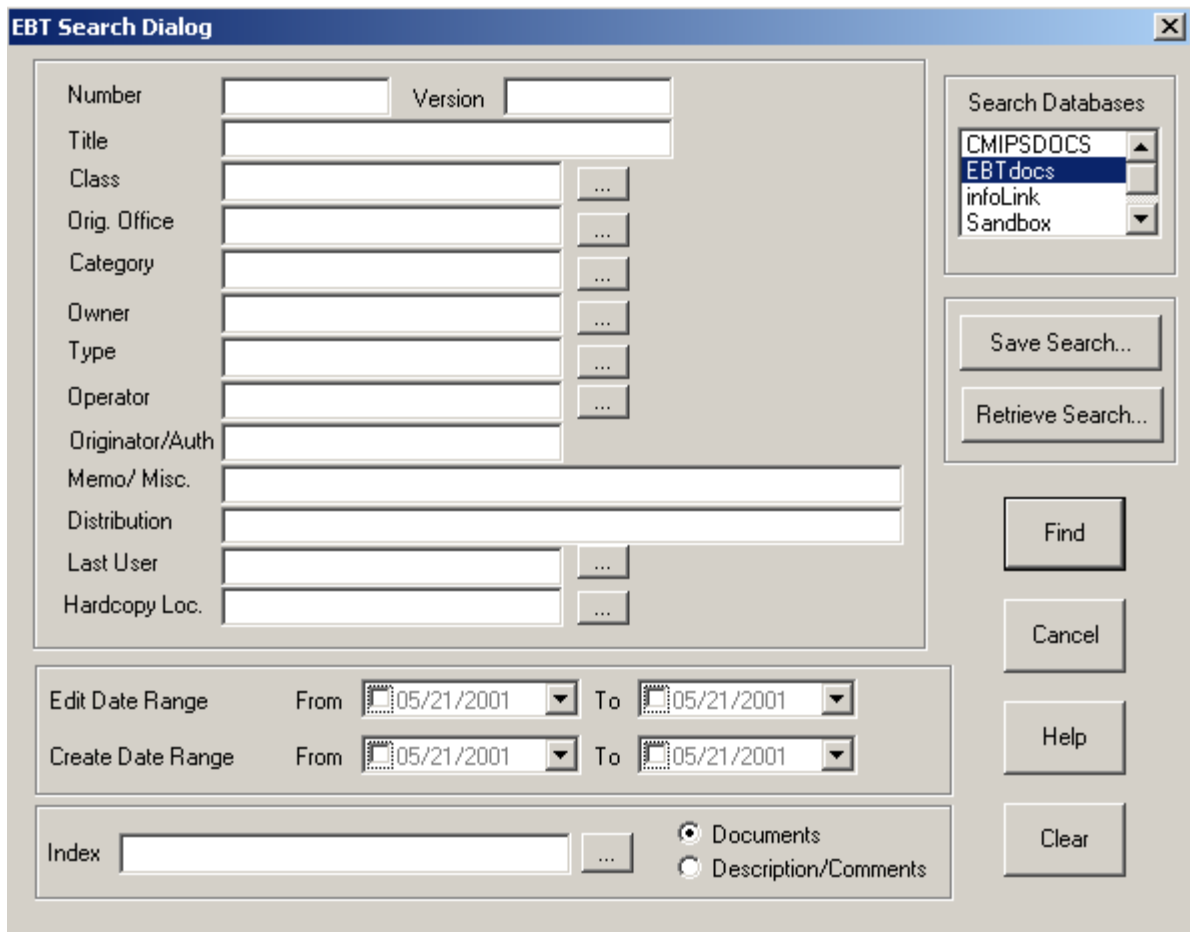


Note that your Worklist and folders are also in the tree view.

Retrieving Documents

Use your Worklist to access the last 40 documents you have worked on or perform a search to find a document. To search, highlight the database (EBTdocs) and select Search... from the iManage menu.

The normal Profile Search Dialog will appear for you to enter your search criteria and click on Find.



The EBT Search Dialog window is a standard Windows-style application window with a title bar that reads "EBT Search Dialog" and a close button (X) in the top right corner. The main area is divided into several sections. On the left, there is a list of search criteria: Number, Title, Class, Orig. Office, Category, Owner, Type, Operator, Originator/Auth, Memo/ Misc., Distribution, Last User, and Hardcopy Loc. Each criterion has a corresponding text input field. Some fields (Class, Orig. Office, Category, Owner, Type, Operator, Last User, and Hardcopy Loc.) have a small button with three dots (a browse button) to their right. To the right of these fields is a "Search Databases" section with a list box containing "CMIPSDOCS", "EBTdocs" (which is highlighted), "infoLink", and "Sandbox". Below the list box are two buttons: "Save Search..." and "Retrieve Search...". At the bottom of the dialog, there are two date range sections: "Edit Date Range" and "Create Date Range". Each section has "From" and "To" labels followed by date pickers showing "05/21/2001". Below these is an "Index" section with a text field and a browse button, and two radio buttons: "Documents" (which is selected) and "Description/Comments". On the far right, there is a vertical column of four buttons: "Find", "Cancel", "Help", and "Clear".

Field	Value	Buttons
Number		
Title		
Class		...
Orig. Office		...
Category		...
Owner		...
Type		...
Operator		...
Originator/Auth		
Memo/ Misc.		
Distribution		
Last User		...
Hardcopy Loc.		...

Search Databases:

- CMIPSDOCS
- EBTdocs
- infoLink
- Sandbox

Buttons: Save Search..., Retrieve Search...

Date Ranges:

- Edit Date Range: From 05/21/2001 To 05/21/2001
- Create Date Range: From 05/21/2001 To 05/21/2001

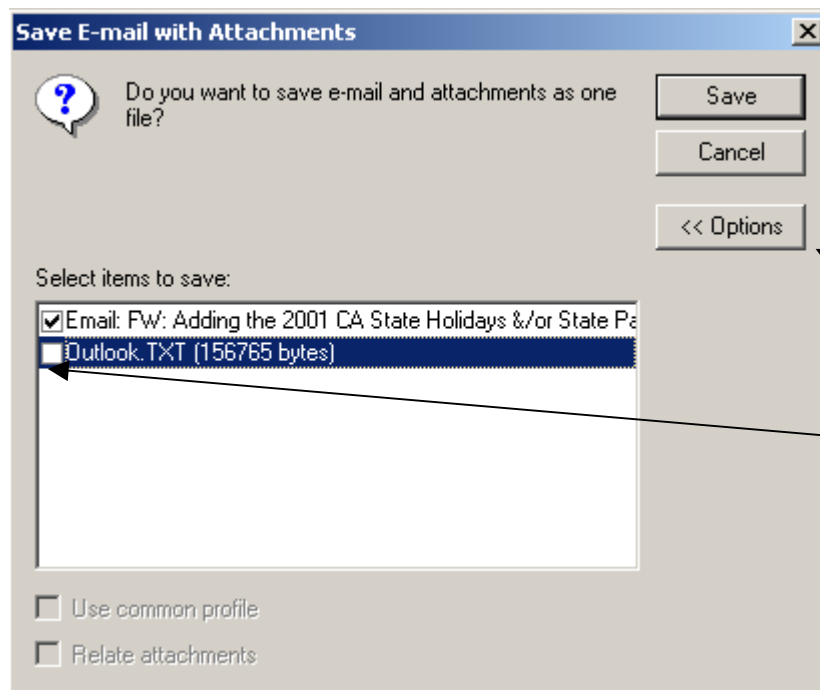
Index: [] ...

Radio Buttons: ☒ Documents, ☐ Description/Comments

Bottom Buttons: Find, Cancel, Help, Clear

Adding Email and Attachments into iManage

Adding email and/or email attachments into iManage is very easy. Highlight your Inbox (or other Outlook folder where the email resides), select the email message, and drag and drop it onto the iManage database (EBTdocs) or the iManage folder where you want the document to appear. The new document profile will appear, fill it in and press OK. If the email has an attachment(s) you will see this dialog box:

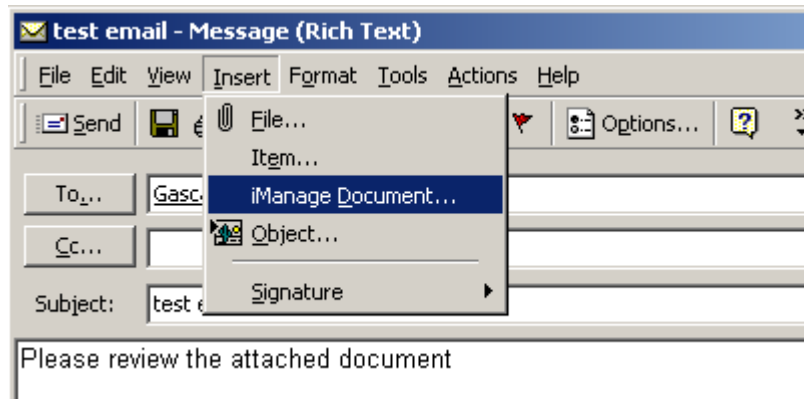


Click on Options to display the list of attachments. Check or Uncheck the items you wish to add to iManage. Click Save and a New Profile will appear.

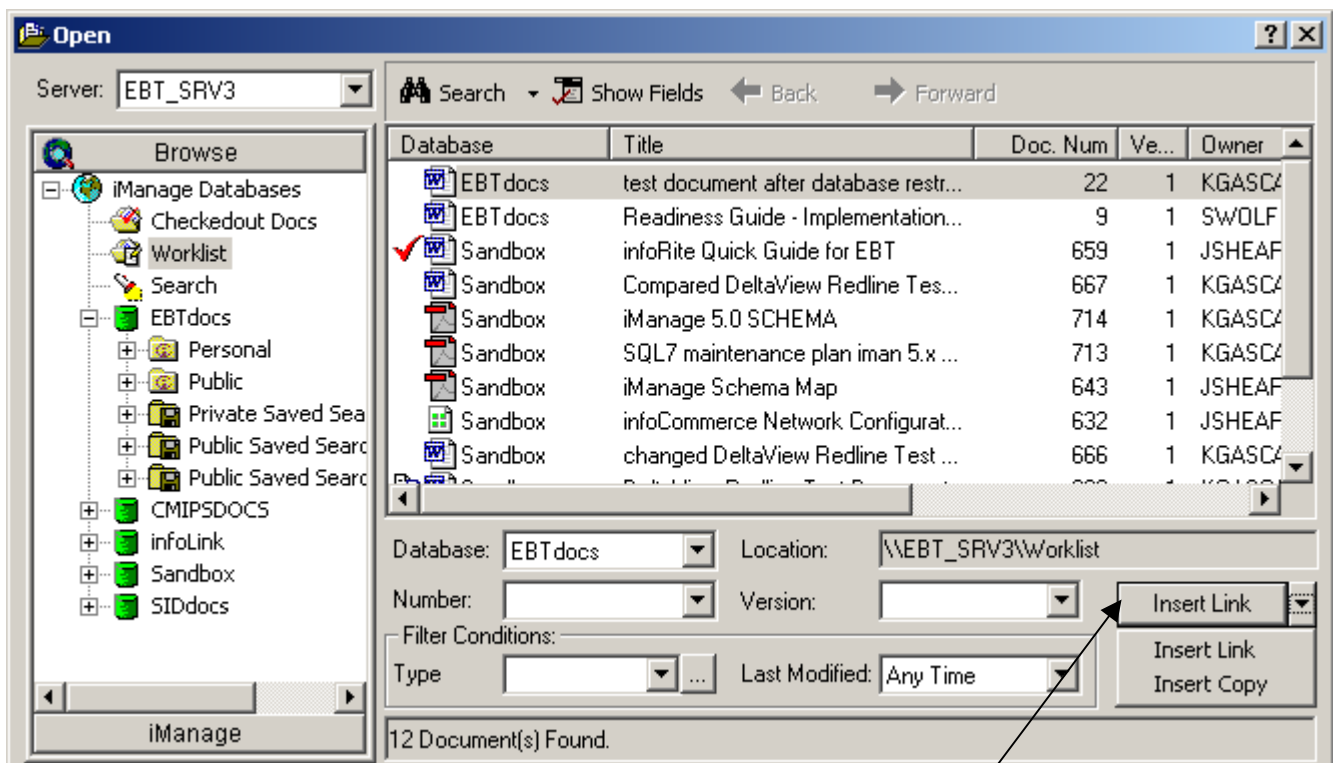
NOTE: It is important to note that the document will be **MOVED** into iManage and will no longer appear in Outlook. IF YOU WANT TO **COPY** THE ITEM INSTEAD OF MOVING IT, YOU SIMPLY HOLD DOWN THE **CONTROL KEY** ON THE KEYBOARD, THEN HIGHLIGHT THE EMAIL AND PERFORM THE DRAG AND DROP.

Attaching a Document from iManage to an Email

To attach a file that resides in iManage, start your email message, then select Insert, iManage Document...



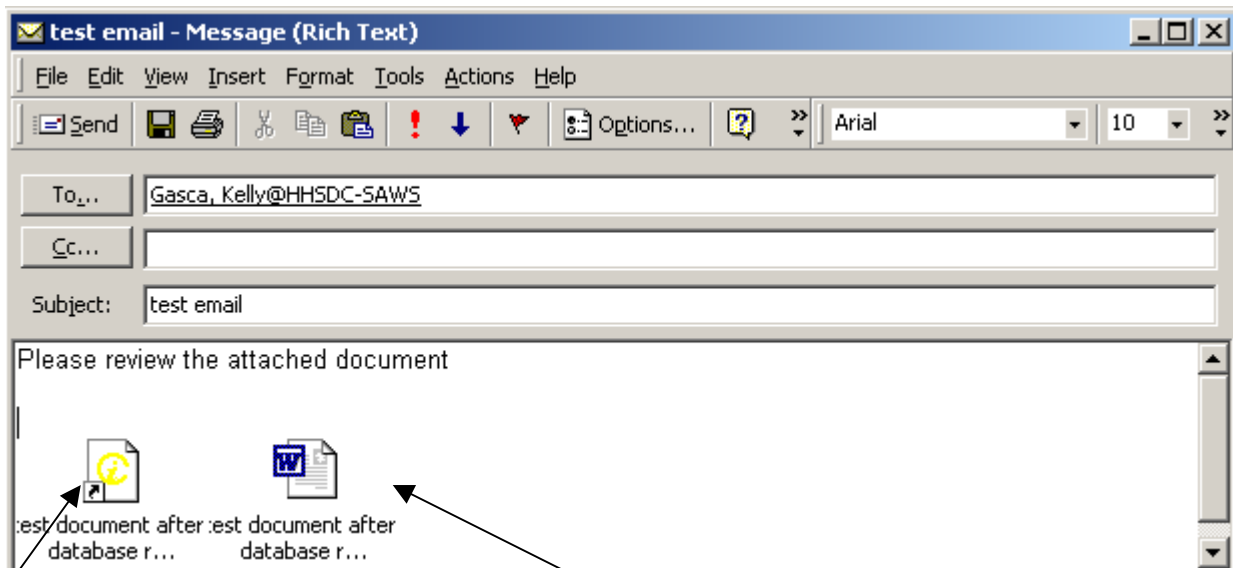
The iManage desktop will appear and you can select the document to attach from your worklist, or perform a search to find it. Once you highlight the document(s) you want to attach, click on the Insert Link or Insert Copy button. To select more than one document, hold down the control key on the keyboard while selecting the documents from the list.



IMPORTANT!! Send a LINK to infoRite, infoLook and infoLink users; send a COPY to people without iManage access

It is important to understand the difference between a document LINK and a document COPY. A copy is simply that.... a copy of the document in its full size and format—the original document is still in iManage and fully usable. A LINK is simply a “shortcut” to the document. When the recipient double-clicks it, it logs them into iManage and opens the document, thus tracking the activity in the history log. ONLY iManage USERS CAN SUCCESSFULLY OPEN A LINK.

After you click on Insert Link or Insert Copy, the attachment appears on the email and you can press Send.



This is a LINK
for iManage

This is a COPY of the
actual document for
non- iManage users

Using infoLink

The infoLink client provides access to documents via a web browser (Internet Explorer or Netscape). It is not yet available at this project.